PROPOSAL EVALUATION WORKSHEET (INDIVIDUAL)

EVALUATION FACTOR: CUSTOMER SERVICE PLAN (RATED)

PROPOSER: ____Keolis- #29_____

DATE: _8/19/2013_____

OVERALL RATING: Good_____

NARRATIVE SUMMARY: The proper met the requirements of the RFP and exceeds stated criteria. The highlights mentioned the establishment of specific metrics for Customer Satisfaction and mentioned the specific goal of increasing customer satisfaction by 5% in the 3rd quarter of operating service. The proposers approach is to restructure the Customer Service Team to reflect proactive performance management. The proposer will use a cloud based issue tracking portal to track complaints & performance metrics as well as report to the MBTA with quarterly customer comment and complaint reports. The restructuring of the Customer Service team includes many positions which may cause overlap. _____

Objective:

The following are the objectives for the Customer Service Plan evaluation factor:

1) To ensure that Proposers demonstrate the ability to maximize customer satisfaction measured by MBTA-approved metrics;
2) To identify Proposers that will continuously improve messaging regarding customer and public safety; and
3) To identify Proposers committed to implementing innovation in the provision of all regular and special service information.

Evaluation Criteria:

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The Proposer has demonstrated the ability to maximize customer satisfaction measured by MBTA-approved metrics. The Proposer has shown that it will continuously improve messaging regarding customer and public safety and that it is committed to innovation in the provision of all regular and special service information.

Instructions:

Evaluators must rate each requirement outlined in the table below as one of the following: (i) Exceptional; (ii) Good; (iii) Acceptable; (iv) Potential to Become Acceptable; or (v) Unacceptable. Please note the following explanations when rating each requirement:

1) A rating of Exceptional is appropriate when the Proposer has demonstrated an approach that is considered to significantly exceed stated criteria in a way that is beneficial to the MBTA. This rating indicates a consistently outstanding level of quality, with very little or no risk that this Proposer would fail to meet the requirements of the solicitation. There are no weaknesses.

2) A rating of Good is appropriate when the Proposer has demonstrated an approach that is considered to exceed stated criteria. This rating indicates a generally better than acceptable quality, with little risk that this Proposer would fail to meet the requirements of the solicitation. Weaknesses, if any, are very minor. Correction of the weaknesses would not be necessary before the Proposal would be considered further.

3) A rating of Acceptable is appropriate if the Proposer has demonstrated an approach that is considered to meet the stated criteria. This rating indicates an acceptable level of quality. The Proposal demonstrates a reasonable probability of success. Weaknesses exist but can be readily corrected through requests for Clarification or Communications.

4) A rating of Potential to Become Acceptable is appropriate if the Proposer has demonstrated an approach that fails to meet stated criteria as there are weaknesses, but they are susceptible to correction through Discussions. The response is considered marginal in terms of the basic content and/or amount of information provided for evaluation, but overall the Proposer is capable of providing an acceptable or better Proposal.

5) A rating of Unacceptable is appropriate if the Proposer has demonstrated an approach that indicates significant weaknesses and/or unacceptable quality. The Proposal fails to meet the stated criteria and/or lacks essential information and is

conflicting and/or unproductive. There is no reasonable likelihood of success; weaknesses are so major and/or extensive that a major revision to the Proposal would be necessary.

Ratings for each requirement must be recorded in the associated Rating column, and a detailed explanation of why a particular rating was given to a requirement must be recorded in the associated Comments/Justification for Rating column. The Appendix B Section column identifies relevant sections of Appendix B (Operations and Management Proposal Instructions) to the Instructions to Proposers.

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Requirement No.	Appendix B Section	Requirement	Rating	Comments/Justification for Rating
1.	B8.2(A)	The Proposer shall provide a Customer Service Plan that describes in detail the Proposer's approach to providing the customer service functions described in the Contract, including the customer service services described in Schedule 3.7 (Operator Customer Service Responsibilities) of the Commuter Rail Operating Agreement. Elements of the Customer Service Plan shall include, but not be limited to, proposed approaches to the following: 1. Providing prompt and accurate public information regarding schedules, routes, delays and other service disruptions, and all other aspects of Commuter Rail Services about which customers should be informed; 2. Lost and found services; 3. Planning for, and handling of, service related to special events; 4. Responding promptly and effectively to customer complaints and suggestions for service improvements; 5. Service monitoring;	**Good**	**Lost and Found Services will be transparent to customer and MBTA. The proposer will use the Issue tracking portal to log and track items and improve public information related to reporting lost items.** **Proposer will also operate an Operation Service Center staffed 6:30AM-8:00 PM seven days a week. This would include Call Recording system (date stamp all recorded call and maintain copies) as well as an IVR queue based routing system which would interface with Issue tracking portal.** **The proposer also will report to the MBTA with quarterly customer comment and complaint reports.** **Investigate, follow through and resolve complaints to respond within 5 business days of receipt. Notification to MBTA & SWA with maximum 12 hours after receipt of any customer comment or complaint related to ADA. Notification to ODCR within 12 hours for Civil Right and DBE complaints.**

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Requirement No.	Appendix B Section	Requirement	Rating	Comments/Justification for Rating
		6. Performance analysis and reporting; 7. Integrating new technologies and work practices as introduced by the Operator or the MBTA; 8. Provide information management, material management, performance analysis and reporting; 9. All other aspects of communication with customers; and 10. A draft Customer Service Satisfaction Plan as further described in Section 2.13 (Customer Service Satisfaction Efforts) of Schedule 3.7 (Operator Customer Service Responsibilities) to the Operating Agreement.		**The proposer will have Customer Service Management team to include Performance Manager to management operational performance. Will monitor service via social media and Customer Service survey twice a year.**
2.	B8.2(B)	The Proposer shall: (i) identify those portions of the information that it provided in response to Section B8.2(A)(1) – (10) of Appendix B that it considers to be innovative, best practice, beneficial to MBTA Customers and/or cost efficient, and (ii) submit information supporting or otherwise validating its position that said portions are innovative, best practice, beneficial to MBTA Customers and/or cost efficient.	**Good**	**The proposer has a number of Community initiatives to enhance the MBTA's Commuter Rail Service's reputation as a community partners. The Commuter Rail Riders Community under "Think like a Passenger" will also provide valuable feedback regarding service without initiating additional cost.**

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Carla Hodgett #29